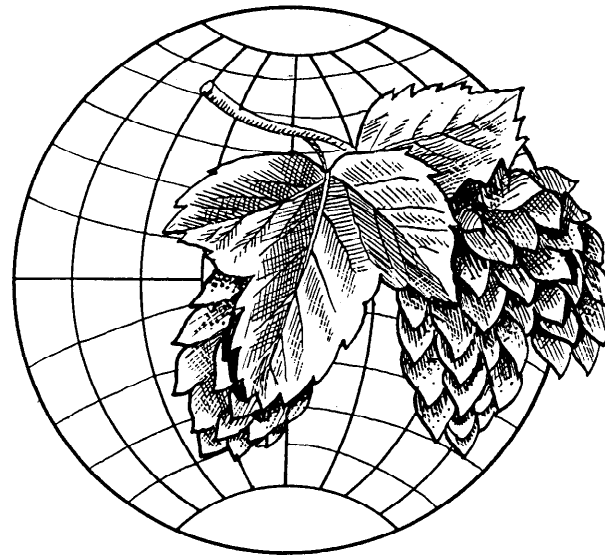


# INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

FREISING, GERMANY

APRIL, 2019



# International Hop Growers' Convention

## IHGC - Economic Commission Summary Reports

Freising, Germany - April, 26, 2019

Country	Hop Acreage 2018 (Hectares, Ha)					Hop Production 2018 (in MT = 1.000 kg)			Alpha acid Prod. MT	Hop Acreage 2019 (Hectares, Ha) estimations					Hop Production 2019 (in MT = 1.000 kg) estimations			Alpha acid Prod. MT
	Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total		Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	
Argentina <sup>°°</sup>	100	60	160	0	<b>160</b>	180	100	<b>280</b>	<b>25</b>	100	60	160	0	<b>160</b>	130	70	<b>200</b>	<b>15</b>
Australia	479	152	631	21	<b>652</b>	1 100	482	<b>1 582</b>	<b>225</b>	500	152	652	55	<b>707</b>	1 360	400	<b>1 760</b>	<b>230</b>
Austria	192	58	250	7	<b>250</b>	380	70	<b>450</b>	<b>30</b>	194	58	253	3	<b>253</b>	360	95	<b>455</b>	<b>36</b>
Belgium	126	54	180	0	<b>180</b>	163	119	<b>282</b>	<b>18</b>	124	58	182	2	<b>182</b>	149	105	<b>254</b>	<b>19</b>
Canada <sup>°</sup>	219	200	419	0	419	329	300	629	63	219	200	419	0	419	329	300	629	63
China <sup>°</sup>	400	2 283	2 683	0	2 683	544	6 500	7 044	600	400	2 283	2 683	0	2 683	544	6 500	7 044	600
Czech Republic	4 679	45	4 724	296	<b>5 020</b>	5 025	101	<b>5 126</b>	<b>185</b>	4 773	47	4 820	230	<b>5 050</b>	6 200	100	<b>6 300</b>	<b>280</b>
France	424	39	463	33	<b>496</b>	775	89	<b>864</b>	<b>25</b>	423	45	467	30	<b>497</b>	750	80	<b>830</b>	<b>36</b>
Germany	10 822	8 465	19 287	857	<b>20 144</b>	20 054	21 740	<b>41 794</b>	<b>4 000</b>	10 900	8 800	19 700	600	<b>20 300</b>	21 500	23 500	<b>45 000</b>	<b>5 000</b>
Japan <sup>°</sup>	60	60	120	0	120	130	143	273	30	60	60	120	0	120	130	143	273	30
New Zealand <sup>°°</sup>	371	71	442	89	<b>531</b>	600	122	<b>722</b>	<b>65</b>	450	81	531	169	<b>700</b>	800	200	<b>1 000</b>	<b>80</b>
Poland	635	946	1 581	81	<b>1 662</b>	1 125	2 083	<b>3 208</b>	<b>280</b>	646	1 016	1 662	0	<b>1 662</b>	1 000	1 600	<b>2 600</b>	<b>230</b>
Romania	73	197	270	7	<b>277</b>	85	130	<b>215</b>	<b>19</b>	75	202	277	3	<b>280</b>	90	185	<b>275</b>	<b>29</b>
Russia	162	66	228	24	<b>252</b>	192	138	<b>330</b>	<b>33</b>	168	74	242	12	<b>254</b>	200	150	<b>350</b>	<b>35</b>
Serbia <sup>°</sup>	34	33	67	12	79	58	76	134	11	34	33	67	12	79	58	76	134	11
Slovakia	137	0	137	0	<b>137</b>	127	0	<b>127</b>	<b>5</b>	137	0	137	0	<b>137</b>	150	0	<b>150</b>	<b>6</b>
Slovenia	1 526	21	1 547	120	<b>1 667</b>	3 018	60	<b>3 078</b>	<b>160</b>	1 616	21	1 637	0	<b>1 637</b>	2 440	60	<b>2 500</b>	<b>130</b>
South Africa <sup>°</sup>	73	354	427	0	427	77	677	754	75	73	354	427	0	427	77	677	754	75
Spain <sup>°°°</sup>	0	537	537	6	<b>537</b>	0	<b>884</b>	<b>884</b>	<b>109</b>	0	<b>540</b>	<b>540</b>	<b>3</b>	<b>540</b>	0	<b>956</b>	<b>956</b>	<b>109</b>
Ukraine <sup>°</sup>	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30
UK-England	774	174	948	0	<b>948</b>	1 050	327	<b>1 377</b>	<b>92</b>	760	175	935	0	<b>935</b>	1 050	327	<b>1 377</b>	<b>92</b>
USA	17 255	6 001	23 256	723	<b>23 256</b>	33 272	15 901	<b>49 173</b>	<b>5 594</b>	18 140	6 250	24 390	0	<b>24 390</b>	33 196	16 250	<b>49 446</b>	<b>5 600</b>
<b>IHGC</b>	<b>38 850</b>	<b>19 876</b>	<b>58 726</b>	<b>2 276</b>	<b>60 266</b>	<b>68 684</b>	<b>50 122</b>	<b>118 806</b>	<b>11 674</b>	<b>40 101</b>	<b>20 569</b>	<b>60 670</b>	<b>1 119</b>	<b>61 781</b>	<b>70 913</b>	<b>51 854</b>	<b>122 767</b>	<b>12 736</b>

<sup>°</sup> Since no country updates were available, figures from Nuremberg in 2018 were used.

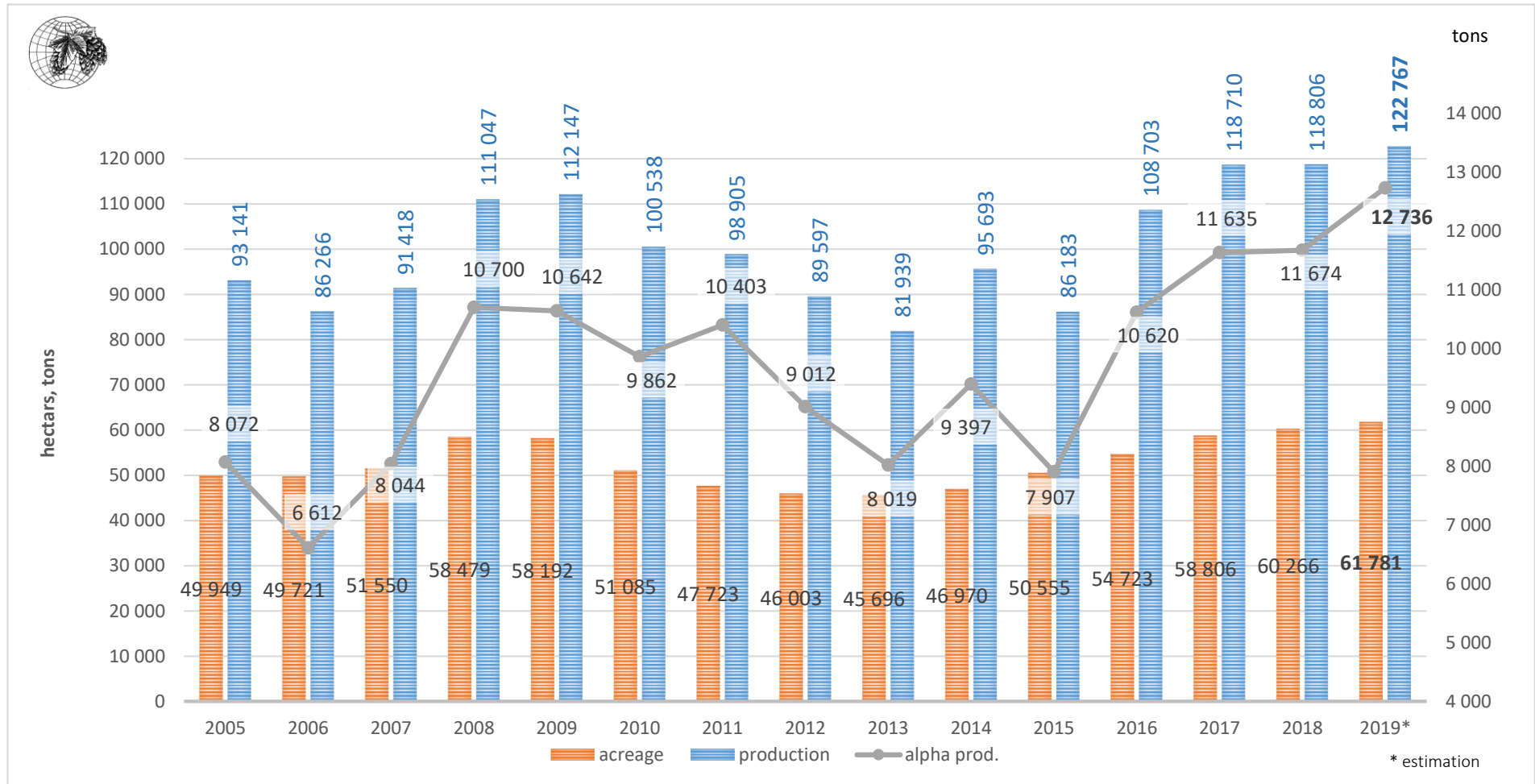
<sup>°°</sup> EC estimation

<sup>°°°</sup> correction discussed at the meeting

<sup>1</sup> Acreage without new hop areas

Difference $\Sigma$ 2019-2018	1 251	693	1 944	-1 157	<b>1 515</b>	2 229	1 732	<b>3 961</b>	<b>1 062</b>
Difference $\Sigma$ 2019-2014	12 709	2 957	15 666	-878	14 810	20 895	7 337	27 032	3 249
Difference $\Sigma$ 2018-2009	14 477	-7 747	6 730	-4 008	7 842	29 582	-18 820	10 762	2 104

Figure 1: Comparison of IHGC crops 2005 - 2019\* (acreage, production, alpha acids production)





# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>Australia</b>
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Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	225,4	14,2	230,0	13,1	4,6	-8,0

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	100	100	100			

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

<b>COMMENTS ON HOP PRODUCTION AND MARKET SITUATION</b>		
-----		
<b>COMMENTS ON ORGANIC HOPS</b>		
	<b>Year N-1</b>	<b>Year N 2019</b>
O-Hop Area (Ha)		
O-Production (MT)		
	Main O-varieties	

Country, Date:  
10. April 2019

Member Organization(s):  
Barth-Haas Group



# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country:

**Austria**

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	19,9	5,8	21,0	6,0	1,1	5,9
Alpha	10,5	12,3	14,5	13,6	4,0	13,0
Total	30,4		35,5		5,1	

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons	410	390	320	200	175	100
% Crop / Year N	98	85	75	50		

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops	7,2	7,4	7,5	1,4	
Alpha Hops	7,5	7,5	7,6	1,3	
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	11,7	12,3
O-Production (MT)	14,0	14,0

### Main O-varieties

Perle            Spalter Select  
Aurora        Malling        Cascade

Country, Date:

Member Organization(s):





# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>Belgium</b>
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Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	6,7	4,1	7,5	5,0		
Alpha	11,5	9,7	11,55	11,0		
Total	18,2		19,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

The period from May 2018 to mid-August 2018 was featured with lots of sun, high temperatures and persistent drought. The average alpha values of harvested hops in 2018 were very low.

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	12,3	15,1
O-Production (MT)	17,0	20,0

### Main O-varieties

Golding Pilgrim  
WGV Challenger

Country, Date:  
Belgium 20.04.2019

Member Organization(s): VZW Hop  
Joris Cambie



# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>Czech Republic</b>
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Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	175,0		268,0		93,0	53,1
Alpha	10,0		12,0		2,0	20,0
Total	185,0		280,0		95,0	51,4

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	100	100	97	80	75	60

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops	7,3	7,8			farmer price
Alpha Hops	5,0	5,2			farmer price
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

### COMMENTS ON ORGANIC HOPS

	Year N-1 est.	Year N 2019 est.
O-Hop Area (Ha)	10,55	10,55
O-Production (MT)	6,90	10,00

Main O-varieties

Saaz

Premiant

Country, Date:  
14.04.2019

Member Organization(s):  
Hop Growers Union of the Czech Rep.

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country:

**France**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	424	423	-2	99,6%
Alpha	39	45	6	115,2%
Total	463	467	4	100,9%

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma	29	24
Alpha	4	6
Total	33	30

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	454	447	-7	98,5%
Alpha	42	51	8	119,4%
Total	496	497	1	100,3%

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	775	750	-25	96,8%
Alpha	89	80	-9	89,9%
Total	864	830	-34	96,1%

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,6	1,7	1,0
Alpha	2,4	1,6	0,7
Total	1,8	1,7	1,0

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Strisselspalt	175,5	168	-7,5	1,40		
Aramis	58,1	68,9	10,8	5,30		
Tradition	22,2	10,9	-11,3	4,10		
Triskel	47,9	44,9	-3	2,80		
Fuggle	54,9	55,4	0,5	2,60		
Golding	46,8	48,9	2,1	1,60		
Challenger	6	6	0	4,70		
Barbe-Rouge	12	12,9	0,9	7,20		
Mistral	8,9	9,9	1	4,60		
Cascade	2,7	4,3	1,6	3,50		
Elixir		8,9	8,9			
<b>Alpha</b>						
Columbus	5,4	5,4	0	9,30		
Brewers Gold	15,7	15,7	0	5,20		
Nugget	9,2	13,4	4,2	9,00		
Magnum	5,8	5,8	0	9,50		
Target	5,65	5,65	0	9,70		

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country:

France

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	17,2	3,2	29,5	3,9	12,3	1,7
Alpha	7,8	7,4	6,5	8,1	-1,3	0,8
Total	25,0	3,9	36,0	4,3	11,0	1,4

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	90	80	80	60	30	30

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production		775	89	864
- Sold Production		725	89	814
= Unsold Hops		50	0	50
% unsold Hops		6,45	0,00	5,79

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>		6,50 - 8,00			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
20.04.2019

Member Organization(s):  
AGPH  
Francis Heitz

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country:

**Germany**

Hop area ( ha )	Year N-1 2018	Year N 2019 estimate	Difference N - (N-1)	Difference %
Aroma	10822	10900	78	0,7
Alpha	8465	8800	335	4,0
Total	19287	19700	413	2,1

New Hop Area ( ha )	Year N-1 2018	Year N 2019 estimate
Aroma	346	250
Alpha	511	350
Total	857	600

TOTAL Hop area ( ha )	Year N-1 2018	Year N 2019 estimate	Difference N - (N-1)	Difference %
Aroma	11168	11150	-18	-0,2
Alpha	8976	9150	174	1,9
Total	20144	20300	156	0,8

Production MT	Year N-1 2018	Year N 2019 estimate	Difference N - (N-1)	Difference %
Aroma	20 054	21 500	1 446	7,2
Alpha	21 740	23 500	1 760	8,1
Total	41 794	45 000	3 206	7,7

Yield MT/HA.	Year N-1 2018	Year N 2019 estimate	Difference %
Aroma	1,8	1,9	7,4
Alpha	2,4	2,6	6,0
Total	2,1	2,2	6,8

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Perle	3003	3050	47	5,5	7,3	1,8
Hall.Tradition	2712	2720	8	5	6	1
Hersbrucker	924	930	6	2	2,8	0,8
Hallertauer	687	670	-17	3,6	3,9	0,3
Tettnanger	750	750	0	3	3,7	0,7
Spalter Select	578	580	2	3,5	4,7	1,2
Saphir	515	500	-15	3,3	3,8	0,5
Mand. Bavaria	321	300	-21	7,5	7,6	0,1
North. Brewer	293	280	-13	7,4	8,8	1,4
Amarillo	300	200	-100			
Spalter	120	120	0	3,5	3,6	0,1
Alpha						
Herkules	6309	6500	191	14,6	16,4	1,8
Hall. Magnum	1992	1950	-42	11,6	13,4	1,8
Hall.Taurus	258	230	-28	13,6	16,1	2,5
Nugget	128	120	-8	10,1	11,2	1,1
Polaris	225	250	25	18,4	19,3	0,9

# International Hop Growers' Convention

IHB-Wirtschaftskommission: April. 2019 - Freising, D

Country: <b>Germany</b>
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Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	estimate	%		%
Aroma	960,0	4,8	1200,0	5,6	240,0	0,8
Alpha	3040,0	14,0	3800,0	16,2	760,0	2,2
Total	4000,0	9,6	5000,0	11,1	1000,0	1,5

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric Tons	42871	42944	37774	35714	29937	23897
% Crop / Year N	95	95	84	79	67	53

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production		20 054	21 740	41 794
- Sold Production		20 054	21 740	41 794
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. 2018 vs. 2017	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	9,16	7,86		-14,20	Farmer Price
Alpha Hops	10,35	7,59		-26,70	Farmer Price
Average Price	9,74	7,77		-20,20	Farmer Price
<b>Contract Prices</b>					
Aroma Hops	5,51	6,02		9,30	Farmer Price
Alpha Hops	4,36	4,84		11,00	Farmer Price
Average Price	4,9	5,37		9,60	Farmer Price
<b>Average Prices</b>					
Aroma Hops	5,9	6,23		5,60	Farmer Price
Alpha Hops	5	4,97		-0,60	Farmer Price
<b>AVERAGE</b>	5,4	5,58		3,30	Farmer Price

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION			
COMMENTS ON ORGANIC HOPS			
	Year N-1	Year N 2019	Main O-varieties
	estimate	estimate	
O-Hop Area (Ha)	140	140	HAT/PER/SSE
O-Production (MT)			

Country, Date:

Germany

12.04.2019

Verband deutscher Hopfenpflanzer

gez. Brunner

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country:

**Poland**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	635	646	11	1,2
Alpha	946	1016	69	7,3
Total	1581	1662	81	5,1

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma	11	?
Alpha	69	?
Total	81	?

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	646	646	0	0,0
Alpha	1016	1016	0	0,0
Total	1662	1662	0	0,0

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	1 125	?		
Alpha	2 083	?		
Total	3 208	?		

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,8	?	
Alpha	2,2	?	
Total	2,0	?	

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Lubelski	638,7	638,7				
Lomik	7,4	7,4				
Perle	104,9	104,9				
Sybilla	192,1	192,1				
H. Tradition	141,9	141,9				
Puławski	8,4	8,4				
Triskel	2,7	2,7				
Saaz	2,4	2,4				
Cascade	25,9	25,9				
Centennial	0,5	0,5				
Crystal	0,2	0,2				
Tomyski	1,0	1,0				
Willamette	0,9	0,9				
<b>Alpha</b>						
Marynka	549,0	549,0				
Magnum	1174,6	1174,6				
Magnat	325,5	325,5				
Izabella	0,7	0,7				
Iunga	17,7	17,7				
Chinook	3,3	3,3				
Zula	0,5	0,5				
Rody hodowlane	0,3	0,3				
Taurus	8,0	8,0				
Oktawia	3,1	3,1				



# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country:

**Poland**

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	40,5	3,6				
Alpha	239,1	11,5				
Total	279,6	8,7				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production		1125,47	2082,9	3208,37
- Sold Production		1125,47	2082,9	3208,37
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	4,48	4,65			
Alpha Hops	5,95	5,81			
Average Price	5,22	5,23			
<b>Contract Prices</b>					
Aroma Hops	4,93	4,65			
Alpha Hops	4,84	4,19			
Average Price	4,89	4,42			
<b>Average Prices</b>					
Aroma Hops	4,71	4,65			
Alpha Hops	5,4	5			
<b>AVERAGE</b>	5,06	4,83			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:  
Poland, 17.04.2019

Member Organization(s):  
Polish Hop Growers Association

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>Romania</b>
----------------------------

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	73	75	2	
Alpha	197	202	5	
Total	270	277	7	

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma	2	0
Alpha	5	3
Total	7	3

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	75	75	0	
Alpha	202	205	3	
Total	277	280	3	

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	85	90	5	
Alpha	130	185	55	
Total	215	275	60	

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,2	1,2	3,1
Alpha	0,7	0,9	38,8
Total	0,8	1,0	24,7

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Perle	43	43	0			0
Huller Bitterer	30	28	-2			-2
Tradition	2	2	0			0
Cascade	0	2	2			2
<b>Alpha</b>						
Magnum	108	111	3			3
Merkur	24	24	0			0
Brewers Gold	70	70	0			0

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>Romania</b>
----------------------------

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	6,5	7,6	7,2	8,0	0,7	0,4
Alpha	12,5	9,6	22,2	12,0	9,7	2,4
Total	19,0	8,8	29,4	10,7	10,4	1,9

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons	220	240	270	290	300	320
% Crop / Year N	100	100	100	100	100	100

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production		80	135	215
- Sold Production		80	135	215
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Extremely low rainfall in April , May and to 16 iunie  
Very high temperature in May over 30 C

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	0	0
O-Production (MT)	0	0

Main O-varieties

Country, Date: #####

Member Organization(s):  
MORA ACATIU ERVIN

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country:

**Russia**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	162	168	6	
Alpha	66	74	8	
Total	228	242	14	

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma	16	8
Alpha	8	4
Total	24	12

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	178	176	-2	-2,5
Alpha	74	78	4	3,8
Total	252	254	2	1,3

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	192	200	8	4
Alpha	138	150	12	8,6
Total	330	350	20	12,6

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	137	200	45,9
Alpha	192	150	-21,8
Total	330	350	6,1

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Ранний	162	168	6			
<b>Alpha</b>						
Подвязный	114	112	-2			
Фаворит	24	34	10			

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>Russia</b>
---------------------------

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

<b>COMMENTS ON HOP PRODUCTION AND MARKET SITUATION</b>			
<b>COMMENTS ON ORGANIC HOPS</b>			
	Year N-1	Year N 2019	Main O-varieties
O-Hop Area (Ha)			
O-Production (MT)			

Country, Date:

Member Organization(s):

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>Slovenia</b>
-----------------------------

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	1526			
Alpha	21			
Total	1547			

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma	120	
Alpha	0	
Total	120	

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	1646	1616	-30	1,9
Alpha	21	21	0	0,0
Total	1667	1637	-30	1,8

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	3 078			

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma			
Alpha			
Total	1,8		

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Aurora	551	563	12			
Savinjski golding	178	183	5			
Styrian golding=Celeia	584	558	-26			
Bobek	169	160	-9			
Styrian Gold	49	47	-2			
Styrian Wolf	37	37	0			
Styrian Cardinal	17	17	0			
Styrian Kolibri	5	5	0			
<b>Alpha</b>						
Hall. Magnum	15	15	0			
Extra Styrian Dana	6	6	0			

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>Slovenia</b>
-----------------------------

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	160,0	5,2				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	90	85	80	75	70	N.A.

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production				3078
- Sold Production				3078
= Unsold Hops				0
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>	6,6	7			
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

<b>COMMENTS ON HOP PRODUCTION AND MARKET SITUATION</b>		
-----		
<b>COMMENTS ON ORGANIC HOPS</b>		
	<b>Year N-1</b>	<b>Year N 2019</b>
O-Hop Area (Ha)	1	1
O-Production (MT)		
		Main O-varieties <b>Styrian Gold</b>

Country, Date:  
Slovenia, April 18, 2019

Member Organization(s):  
Hop Growers of Slovenia/  
Hmezad exim/Inbarco





# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country:

**UK**

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	57,0					
Alpha	35,0					
Total	92,0					

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons	1 061	946	500	170		
% Crop / Year N	80	80	40	17		

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production		1 050	327	1 377
- Sold Production		1 050	327	1 377
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	7	6			
Alpha Hops	11	7			
Average Price					
<b>Contract Prices</b>					
Aroma Hops	9	9,4			
Alpha Hops	8	7,6			
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	2	2
O-Production (MT)	1,2	1,2

Main O-varieties

Country, Date:  
UK 18/04/2019

Member Organization(s):  
The British Hop Association

# International Hop Growers' Convention

Country:

**USA**

IHGC-Economic Committee: April 2019 - Freising, Germany

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 255	18 140	885	5,1%
Alpha	6 001	6 250	249	4,1%
Total	23 256	24 390	1 134	4,9%

*2018 total acreage: 985 ha  
outside of PNW + 22,271 ha  
in Pacific Northwest*

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 255	18 140	885	5,1%
Alpha	6 001	6 250	249	4,1%
Total	23 256	24 390	1 134	4,9%

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	33 272	33 196	-76	-0,23%
Alpha	15 901	16 250	349	2,19%
Total	49 173	49 446	273	0,56%

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,93	1,83	-5,10%
Alpha	2,65	2,60	0,00%
Total	2,11	2,03	-4,12%

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha % EBC	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>				9,50%		
Amarillo®, VGXP01	1 001	1 001	0			
Azacca™, ADHA-483	221	221	0			
Cascade	2 488	2 100	-388			
Centennial	1 851	1 600	-251			
Chinook	1 143	1 143	0			
Citra®, HBC 394	2 583	3 450	867			
Cluster	272	272	0			
Ekuanot™, HBC 366	350	250	-100			
El Dorado®	218	299	81			
Idaho 7™		169				
Mosaic®, HBC 369	986	1 680	694			
Palisade®, YCR 4	208	208	0			
Sabro™, HBC 438		200				
Simcoe®, YCR 14	1 614	1 614	0			
Other PNW Aroma	3 434	3 047	-387			
Non-PNW Aroma	886	886	0			
<b>Total Aroma</b>	17 255	18 140	885			
<b>Alpha</b>				15,30%		
Apollo™	415	415	0			
Bravo™	149	149	0			
CTZ	2 477	2 650	173			
Eureka™	219	300	81			
Galena	202	202	0			
Hallertauer Magnum	42	42	0			
Nugget	580	580	0			
Pahto® HBC 682	696	750	54			
Summit™	637	637	0			
Super Galena™	270	270	0			
Other PNW Alpha	216	157	-59			
Non-PNW Alpha	98	98	0			
<b>Total Alpha</b>	6 001	6 250	249			

# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

Country: <b>USA</b>
------------------------

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		EBC %	<i>(estimate)</i>	%		%
Aroma	3 161	9,5%				
Alpha	2 433	15,3%				
Total	5 594	11,4%				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	98%	90%	70%	50%	30%	

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
Total Hop Production		33 272	15 901	49 173
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>	10.98 Euro/kg	10.71 Euro/kg			
Average USD/lb.	\$5,60	\$5,46			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.89 Euro (17 April 2019). Alpha and aroma classifications are based on IHGC list of hop varieties. The USDA statistical reporting system is voluntary, and individual varieties are not reported if three or fewer growers produce the variety in each state.

## COMMENTS ON ORGANIC HOPS

Main O-varieties

	Year N-1	Year N 2019
O-Hop Area (Ha)	173	
O-Production (MT)	217	

Country, Date: USA

IV.19

Member Organization(s):  
Hop Growers of America

Figure 2: Australia hop crops 2005 - 2019

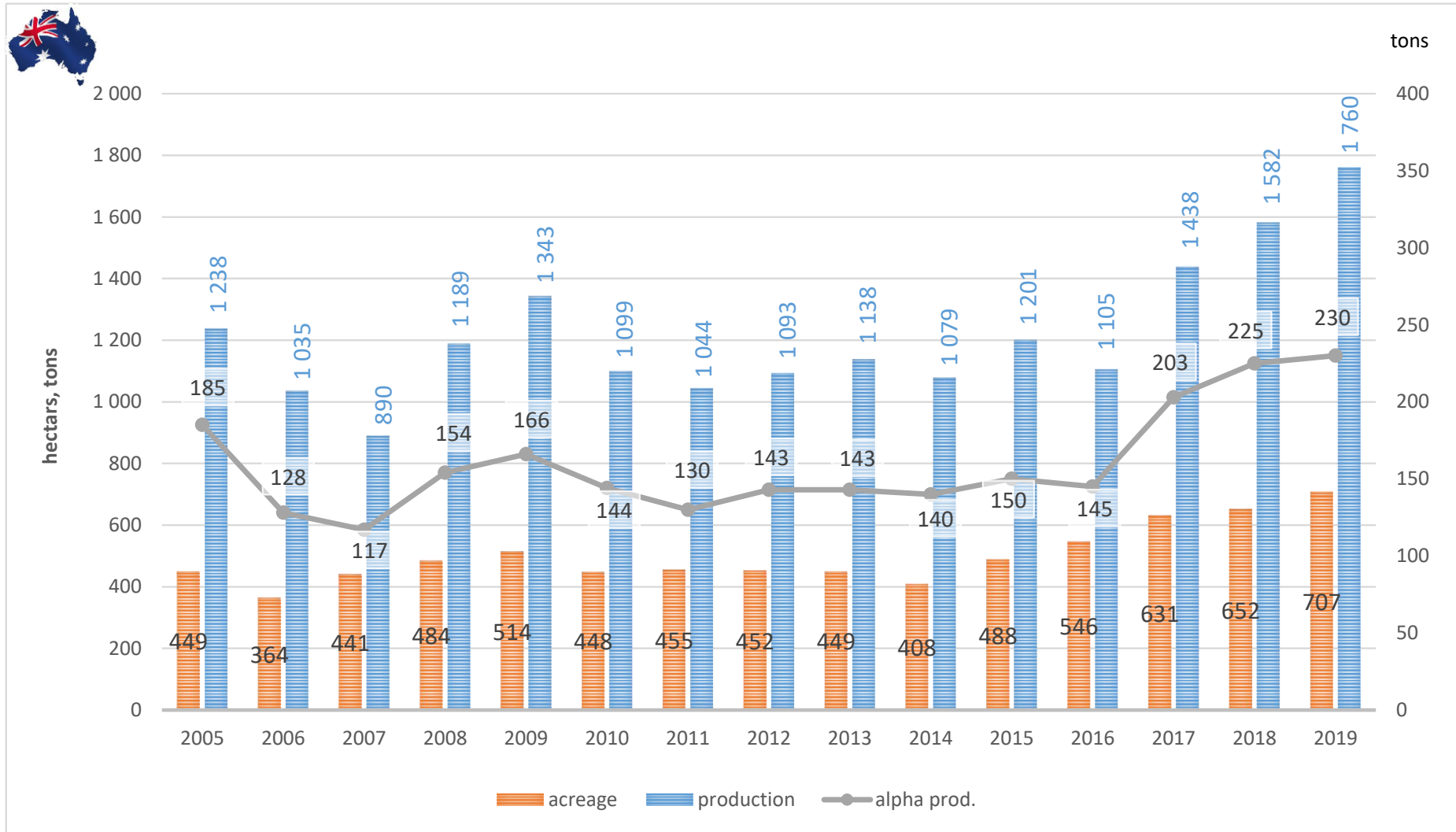


Figure 3: Austria hop crops 2005 - 2019\*

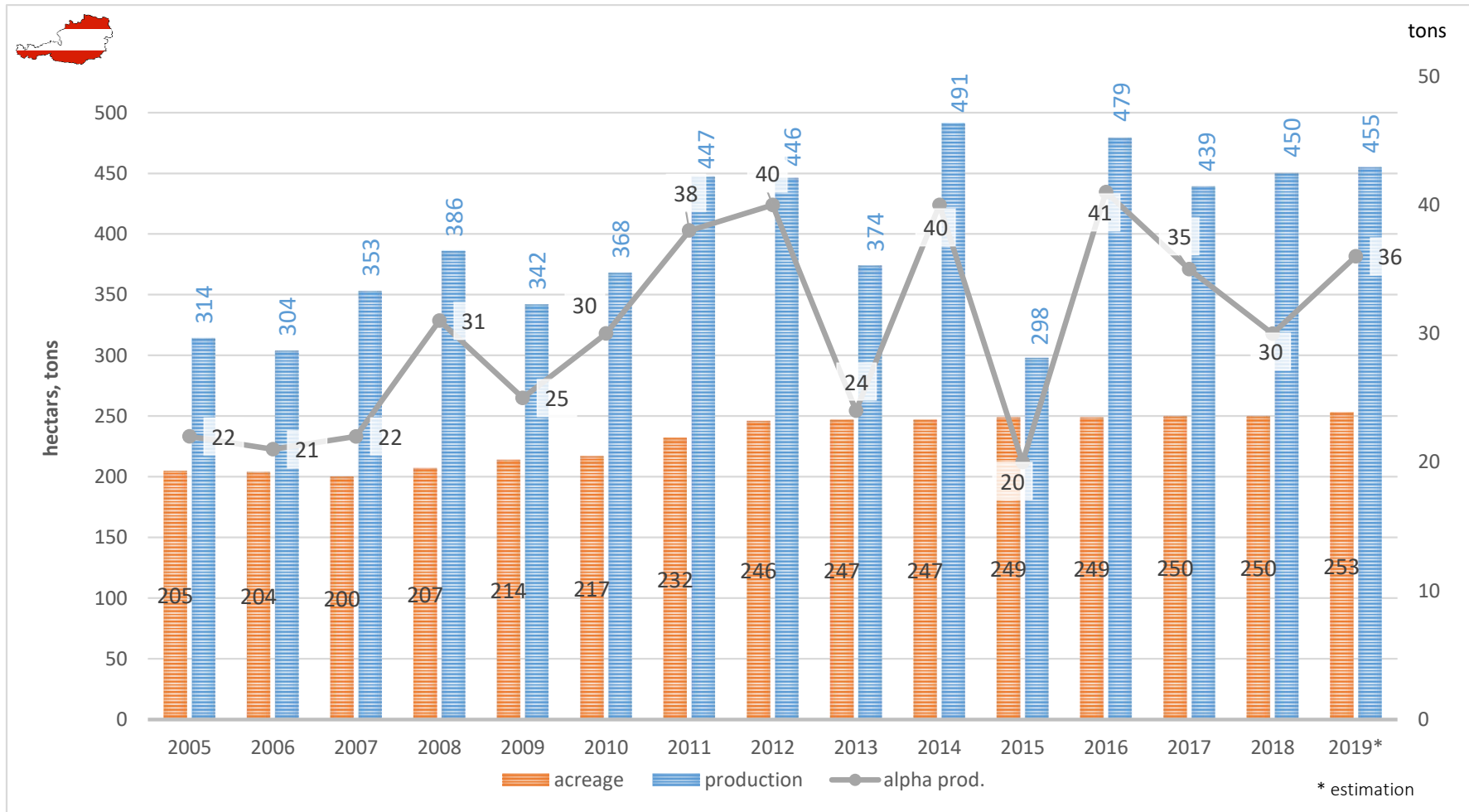


Figure 4: Belgium hop crops 2005 - 2019\*

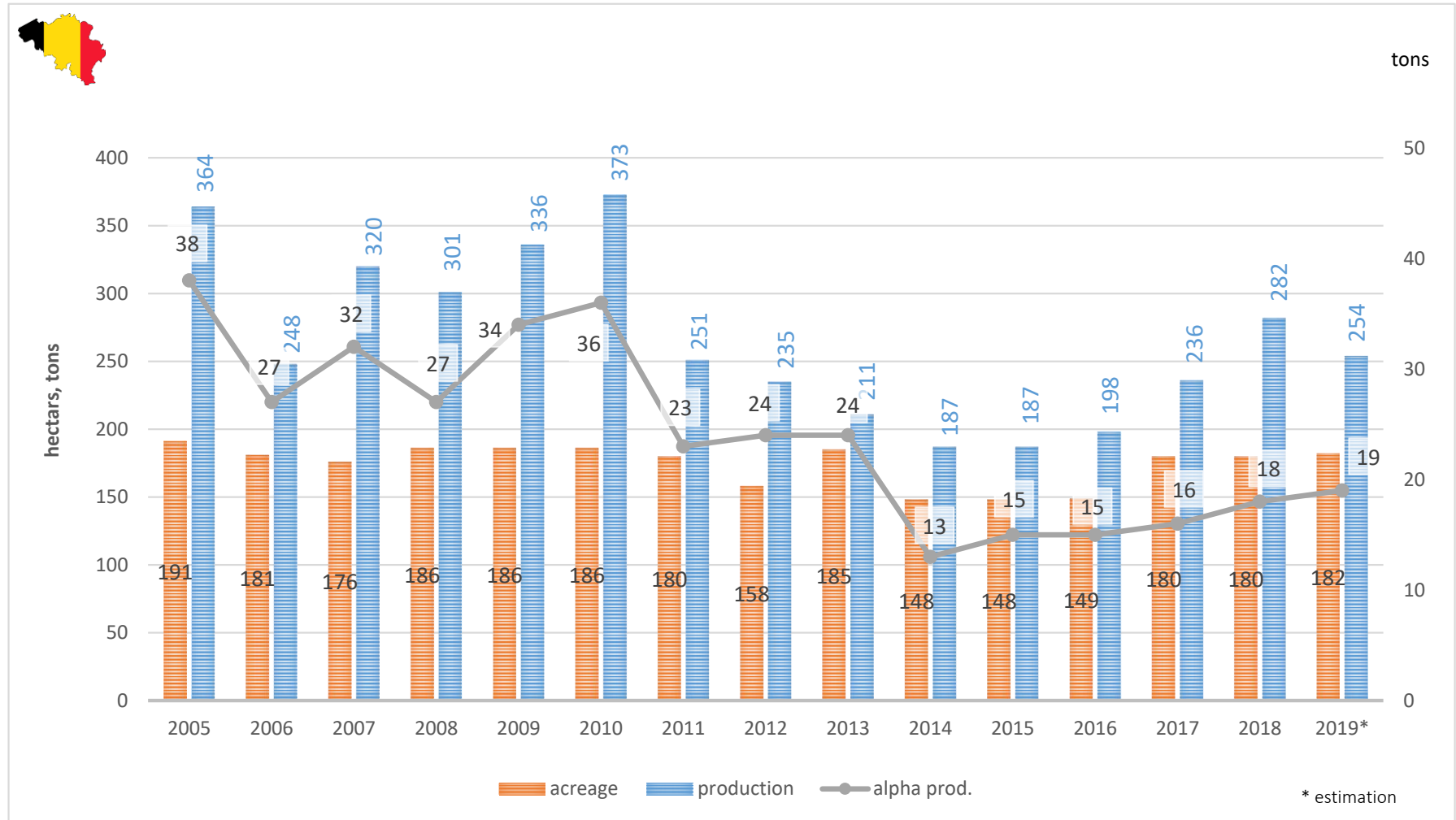


Figure 5: China hop crops 2005 - 2019\*

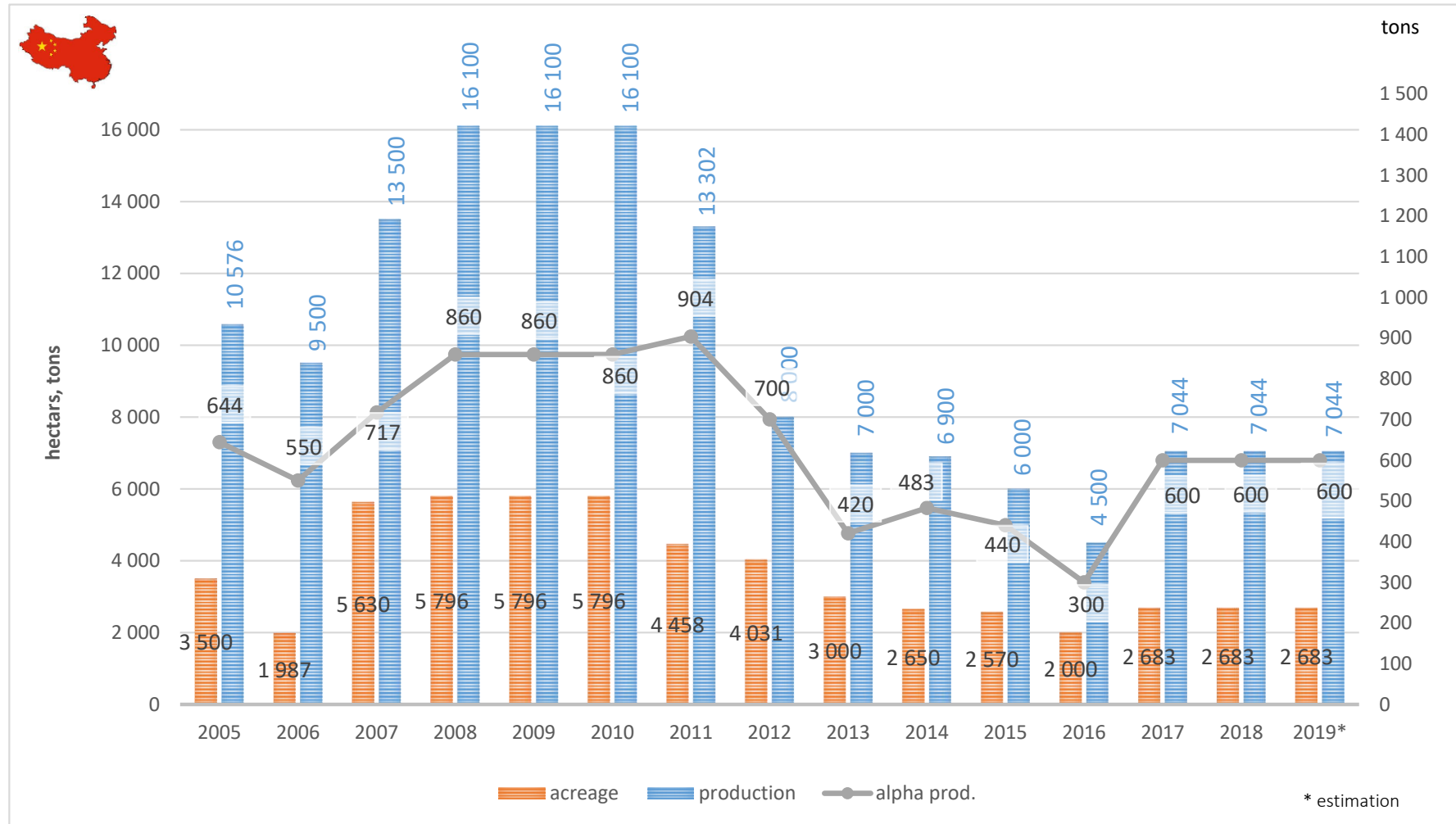


Figure 6: Czech Republic hop crops 2005 - 2019\*

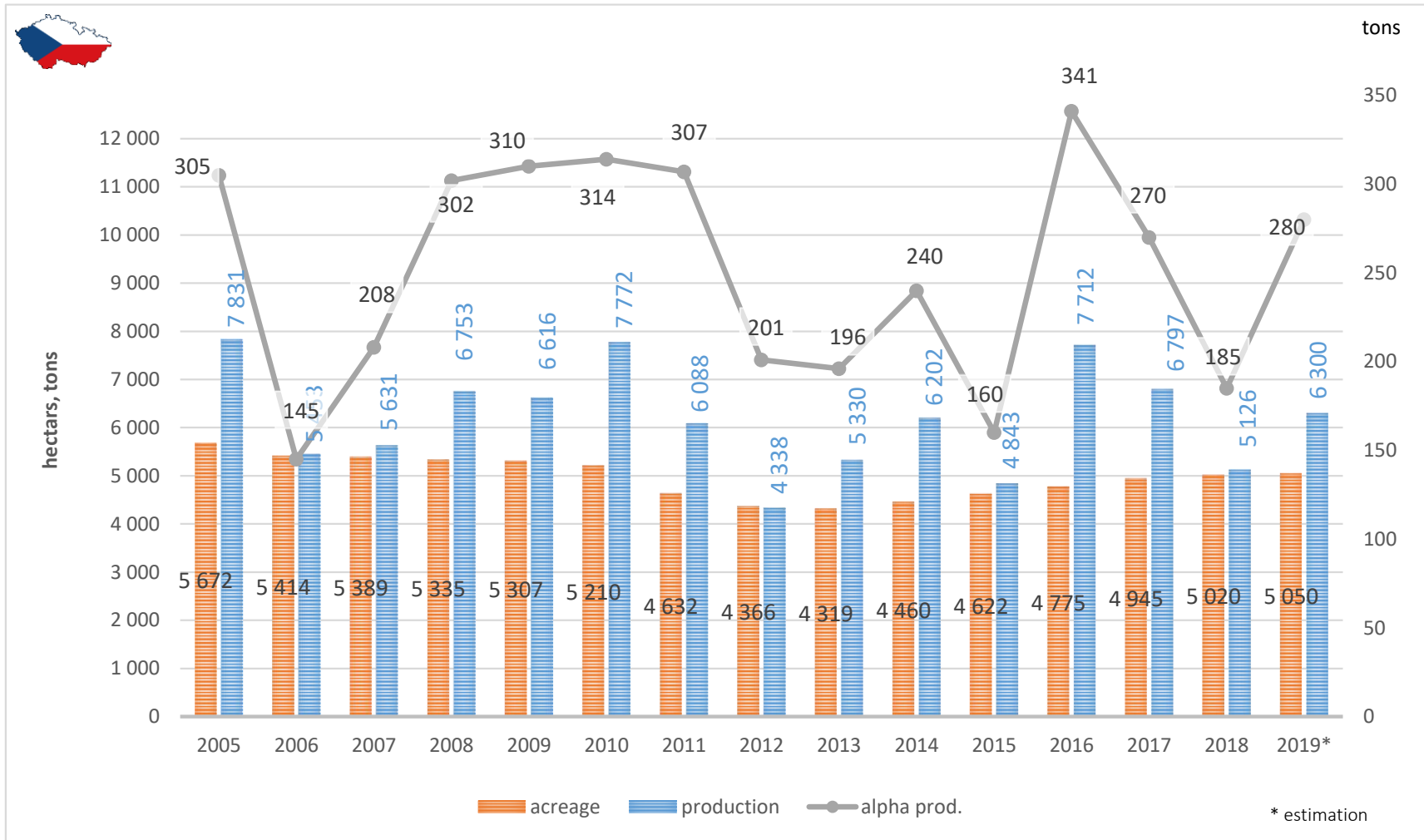




Figure 7: France hop crops 2005 - 2019\*

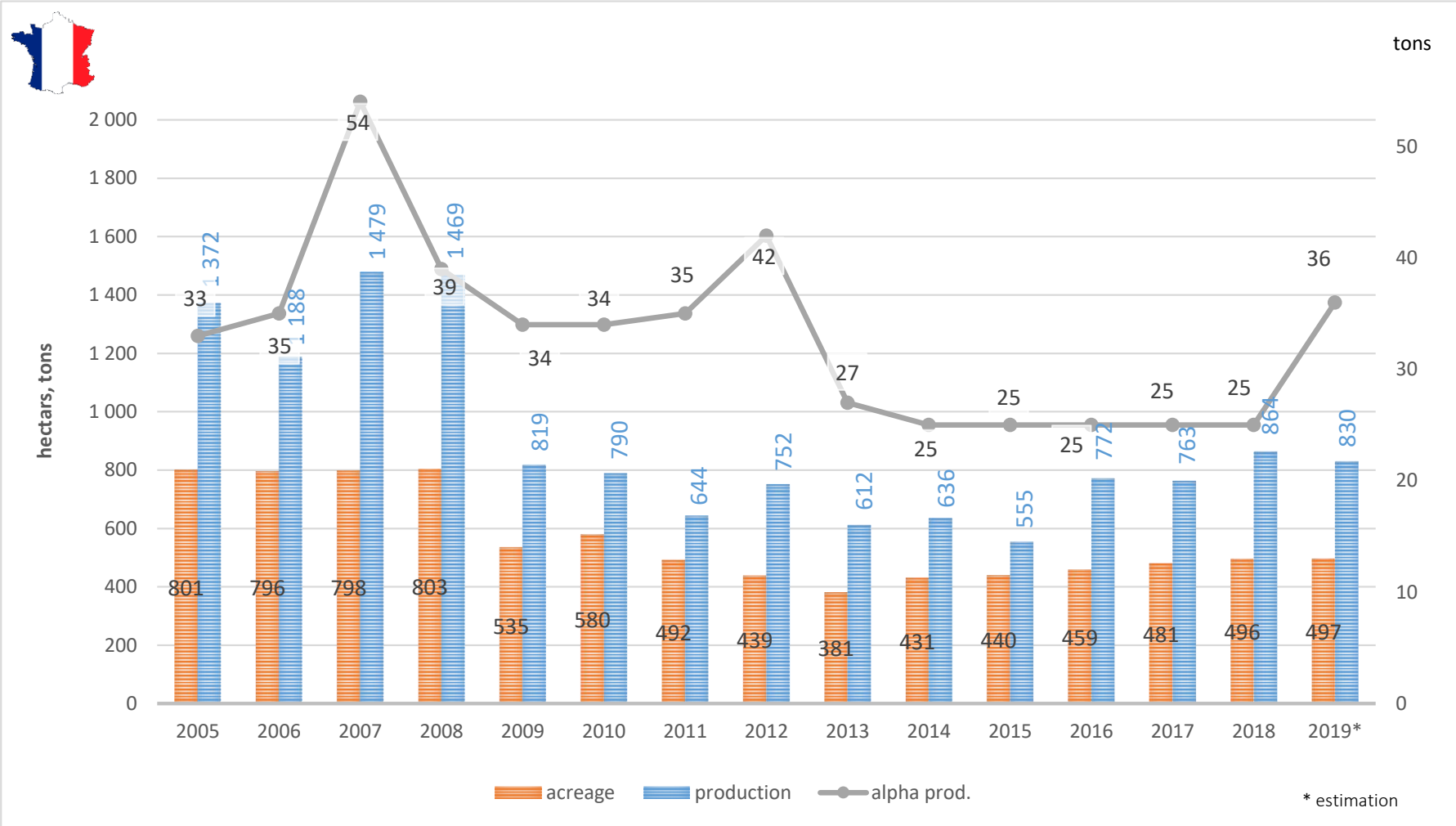


Figure 8: Germany hop crops 2005 - 2019\*

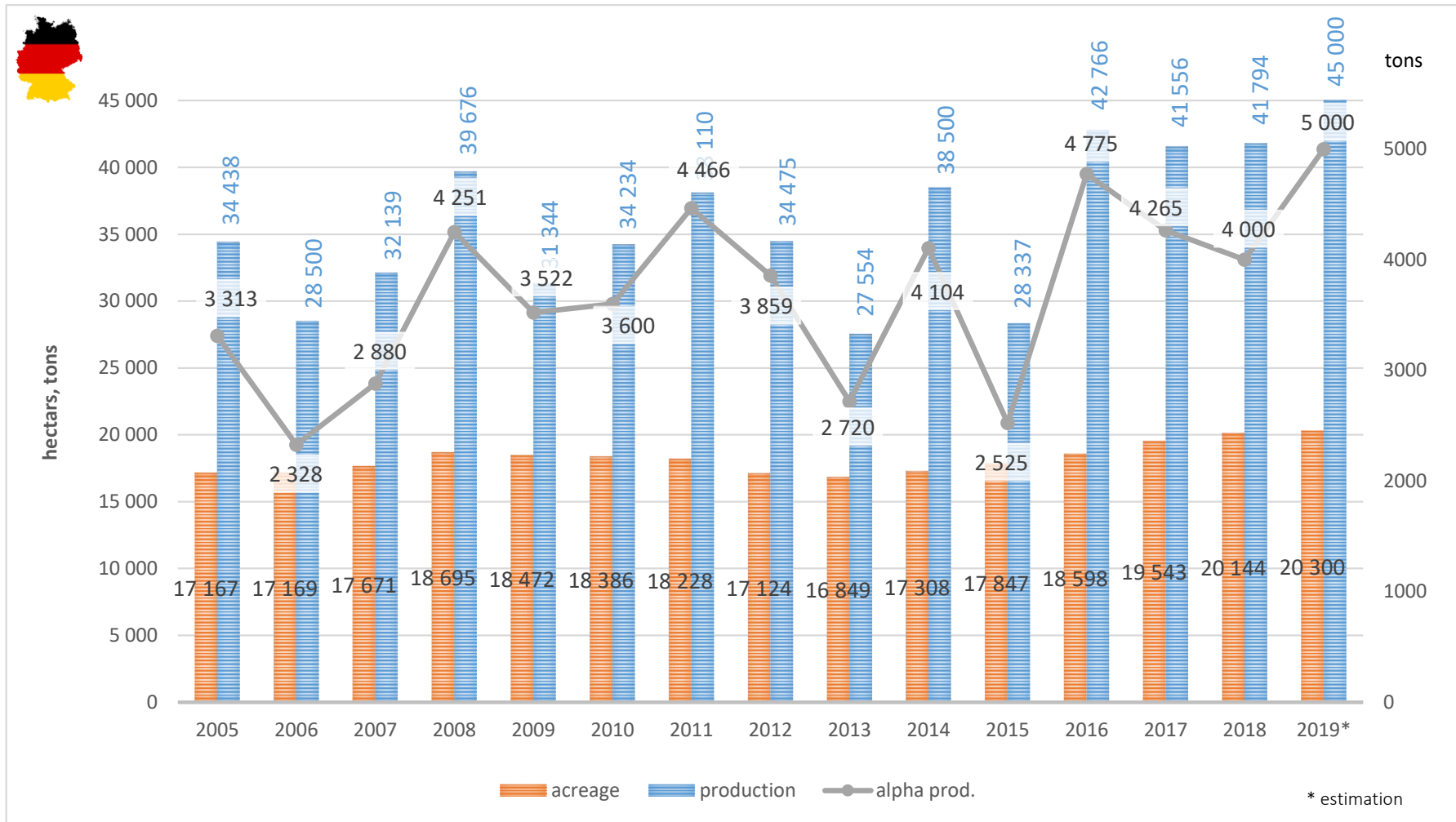


Figure 9: New Zealand hop crops 2005 - 2019

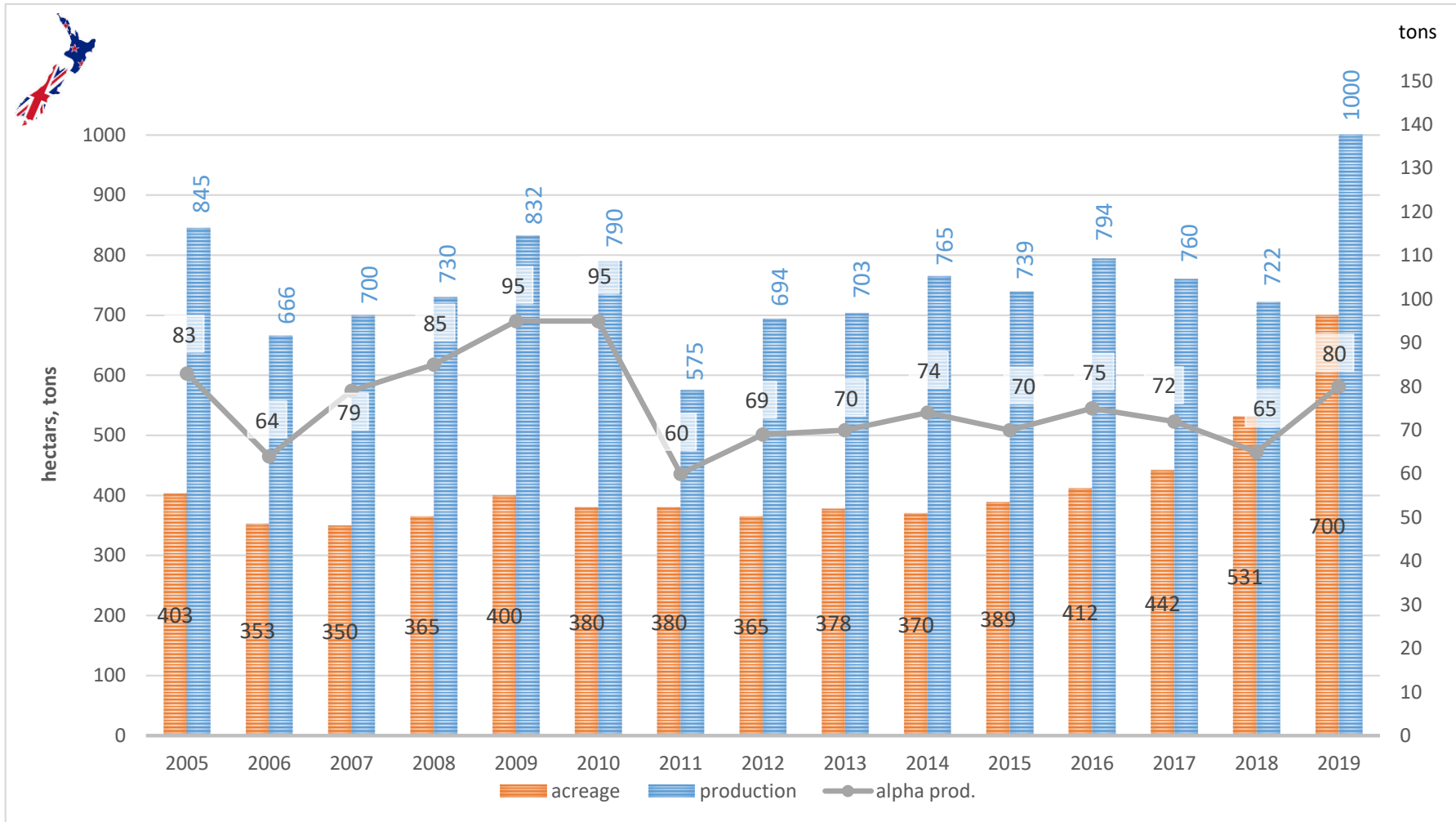


Figure 10: Poland hop crops 2005 - 2019\*

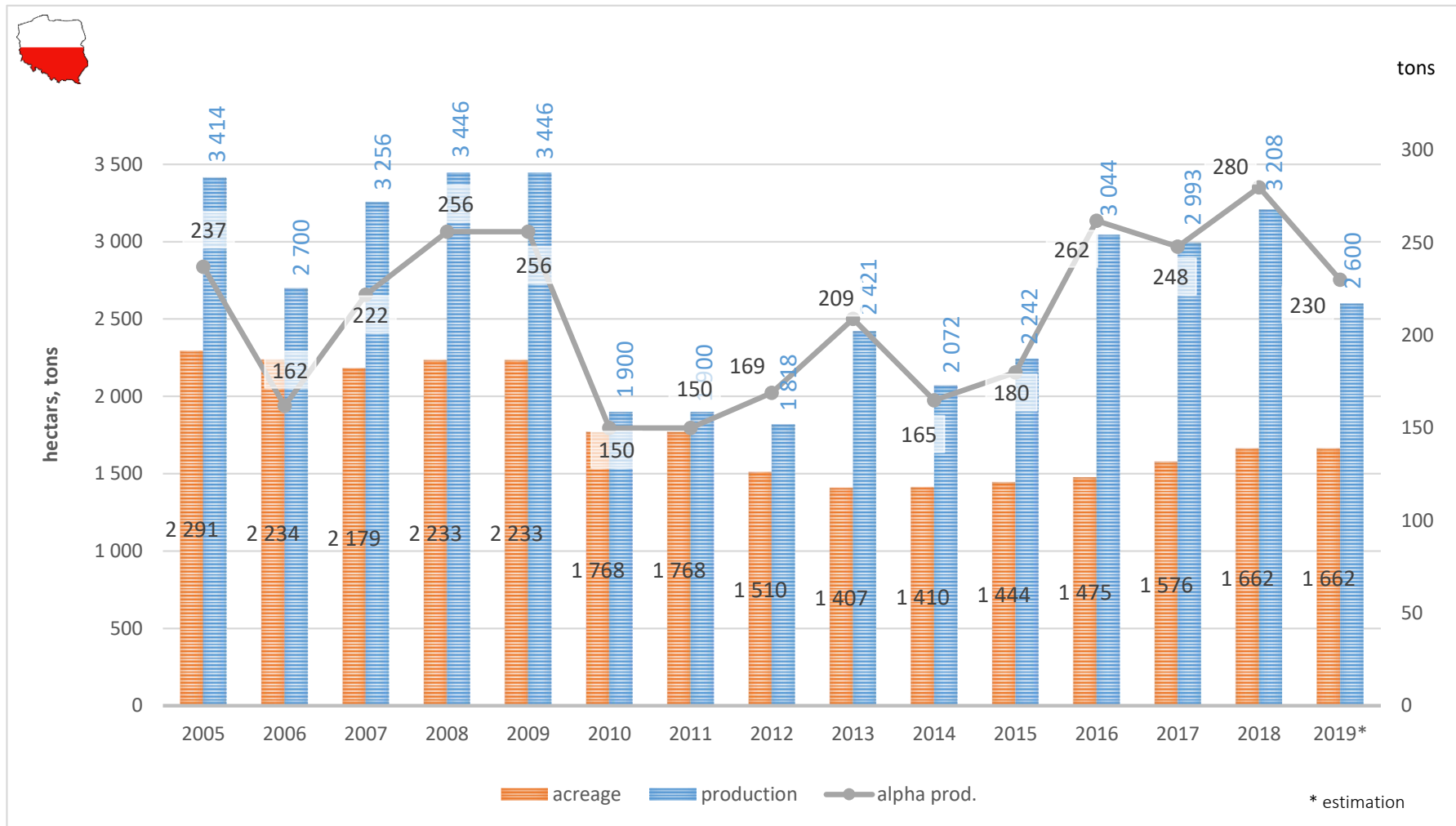


Figure 11: Romania hop crops 2005 - 2019\*

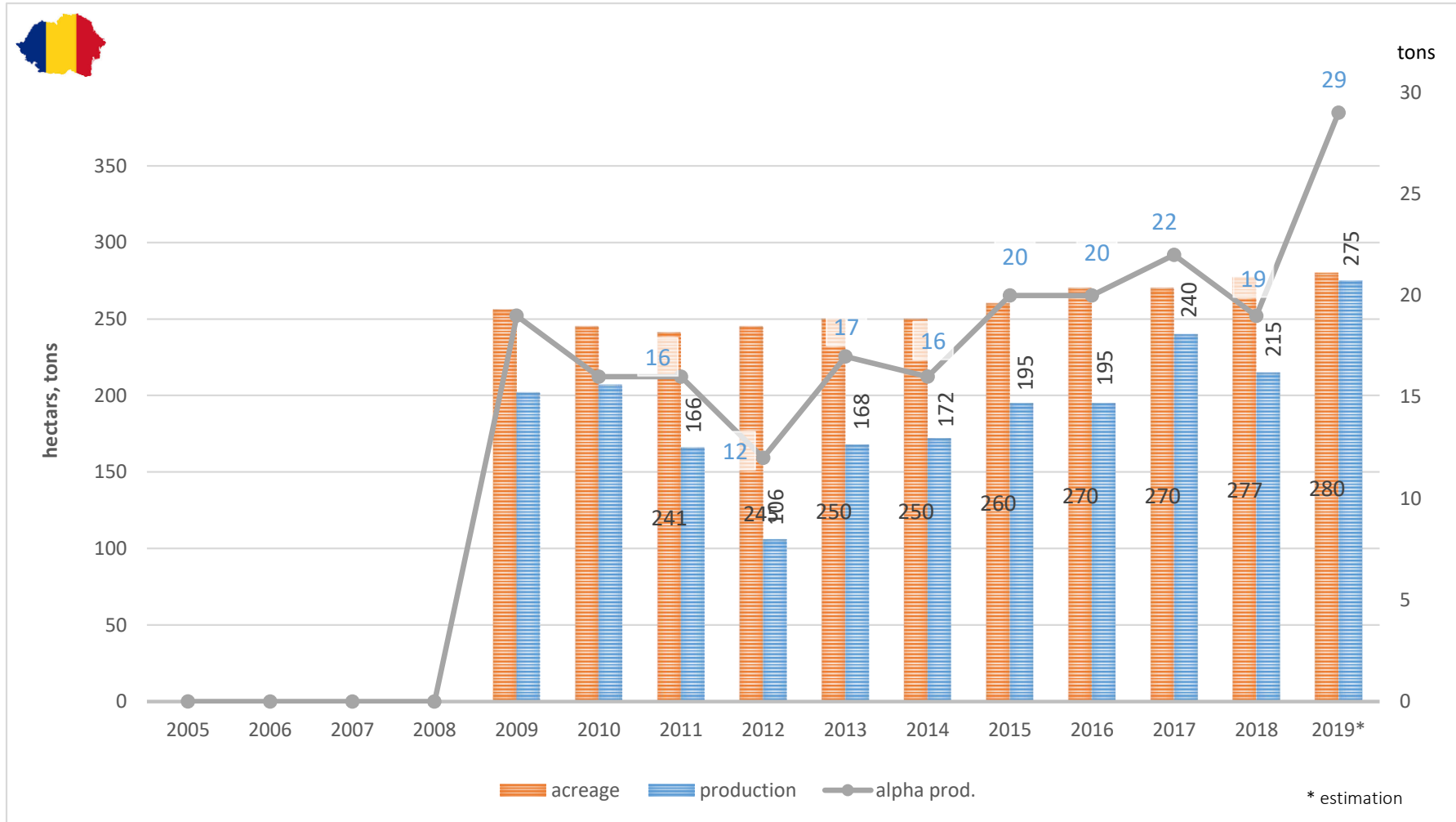


Figure 12: Slovakia hop crops 2005 - 2019\*

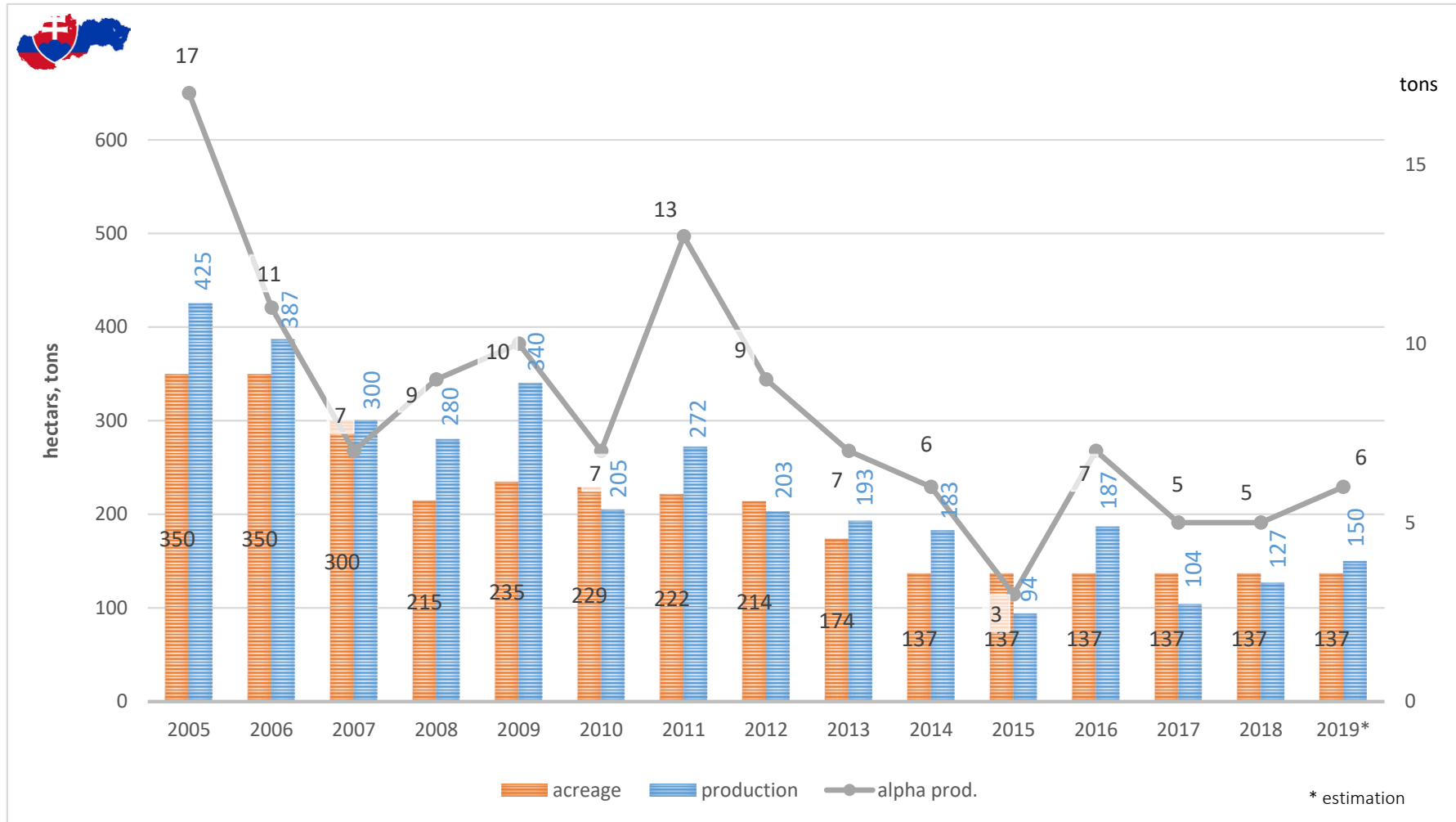


Figure 13: Slovenia hop crops 2005 - 2019\*

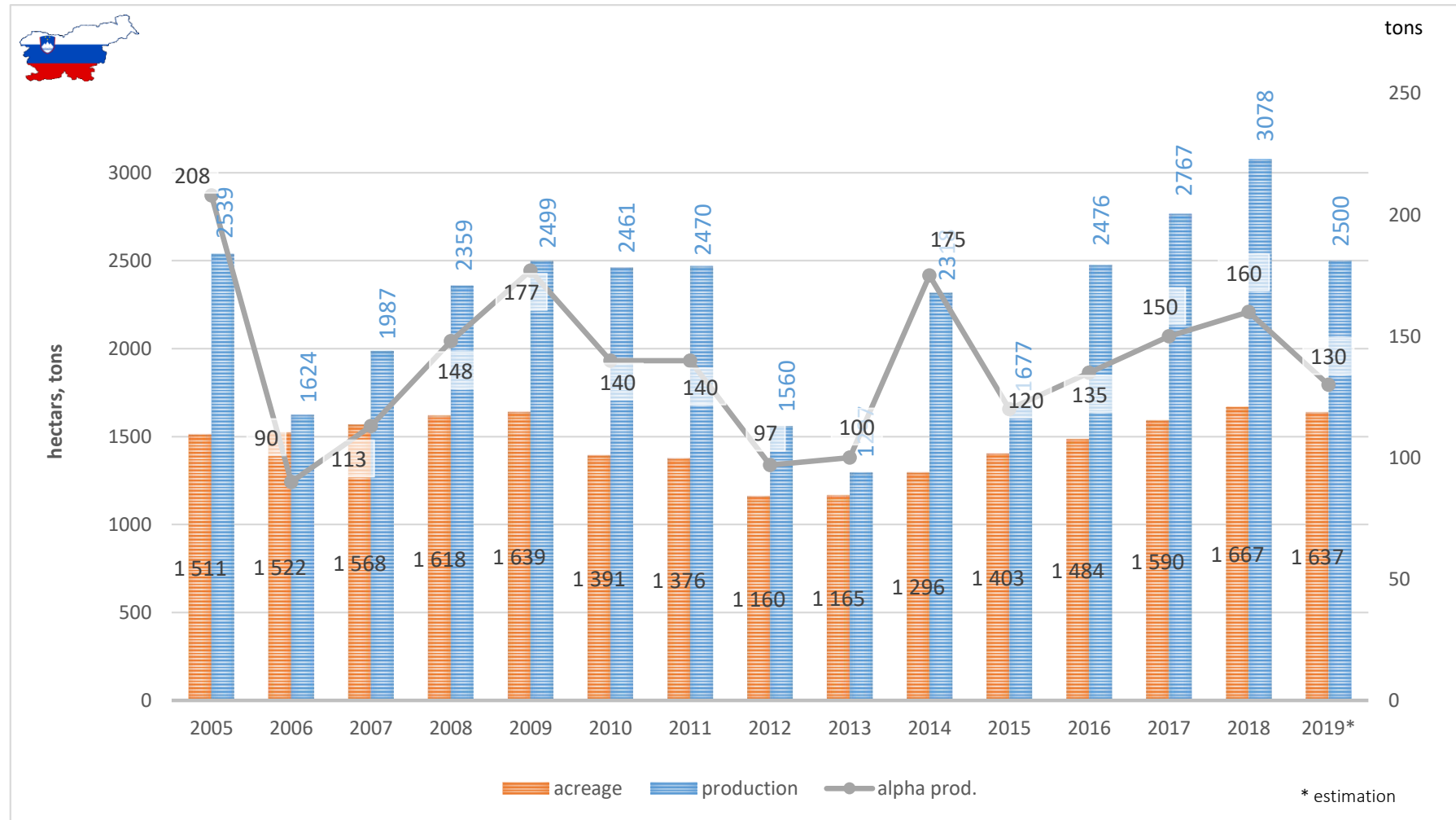




Figure 14: South Africa hop crops 2005 - 2019

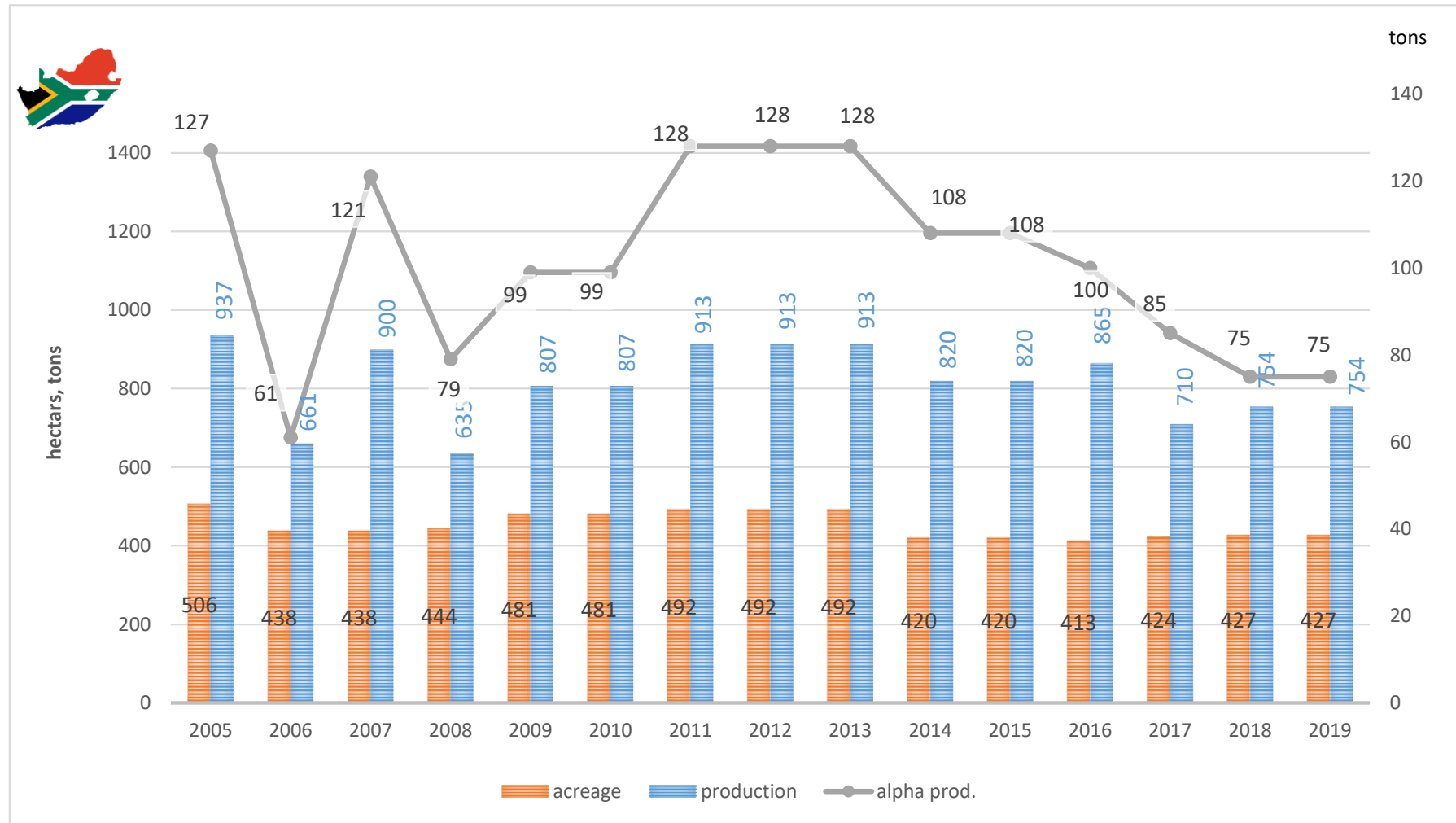




Figure 15: Spain hop crops 2005 - 2019\*

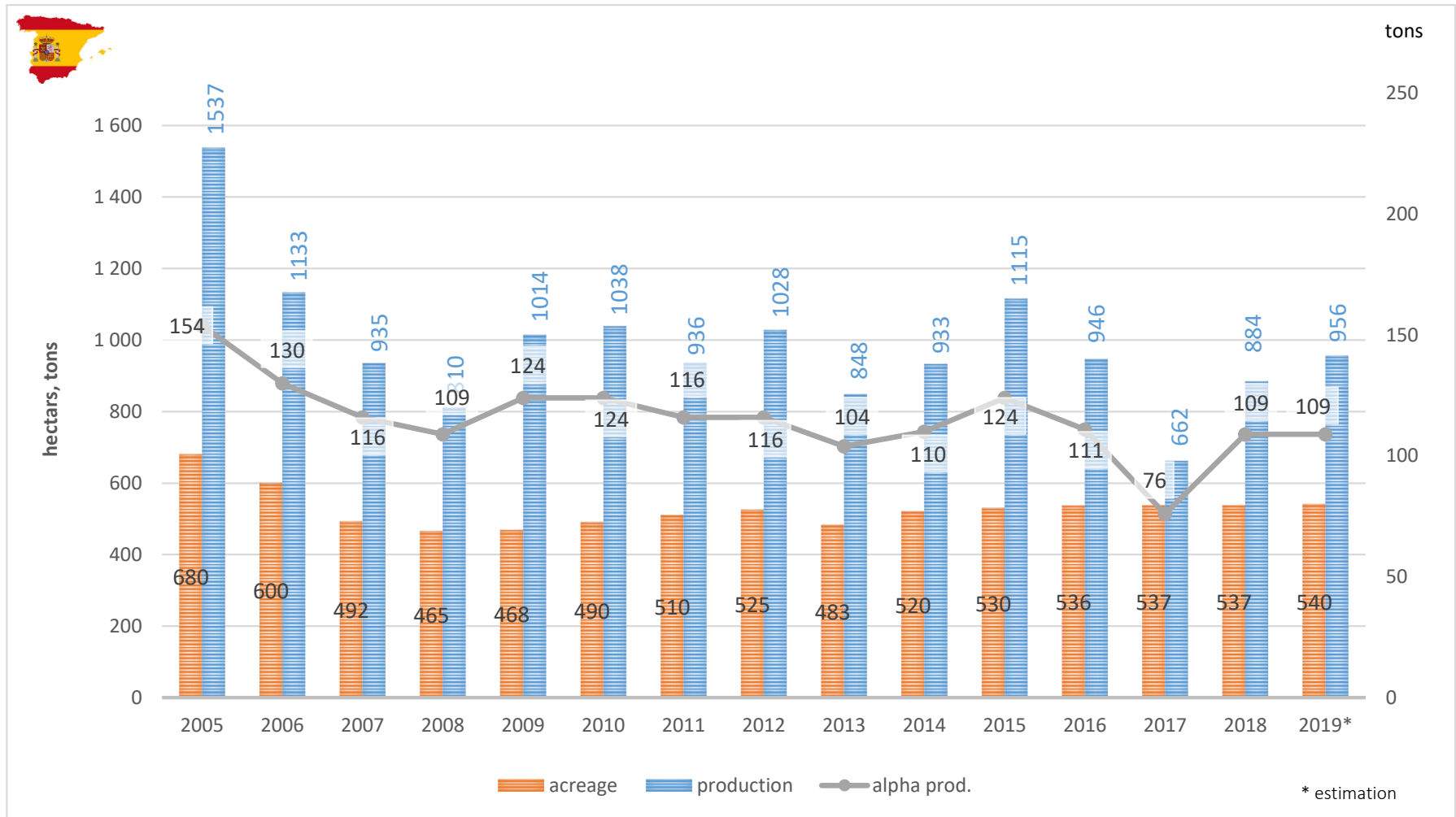


Figure 16: UK-England hop crops 2005 - 2019\*

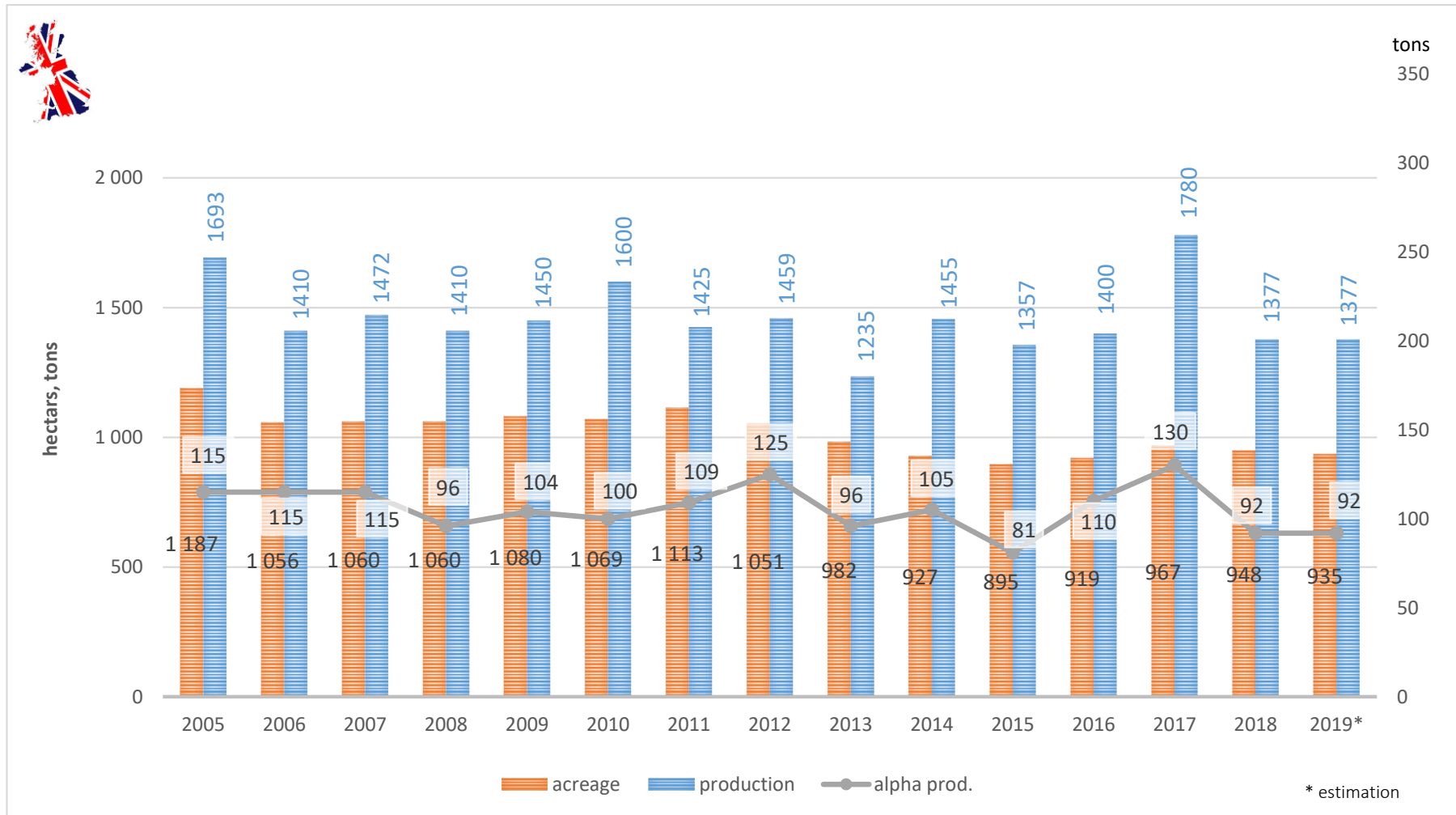
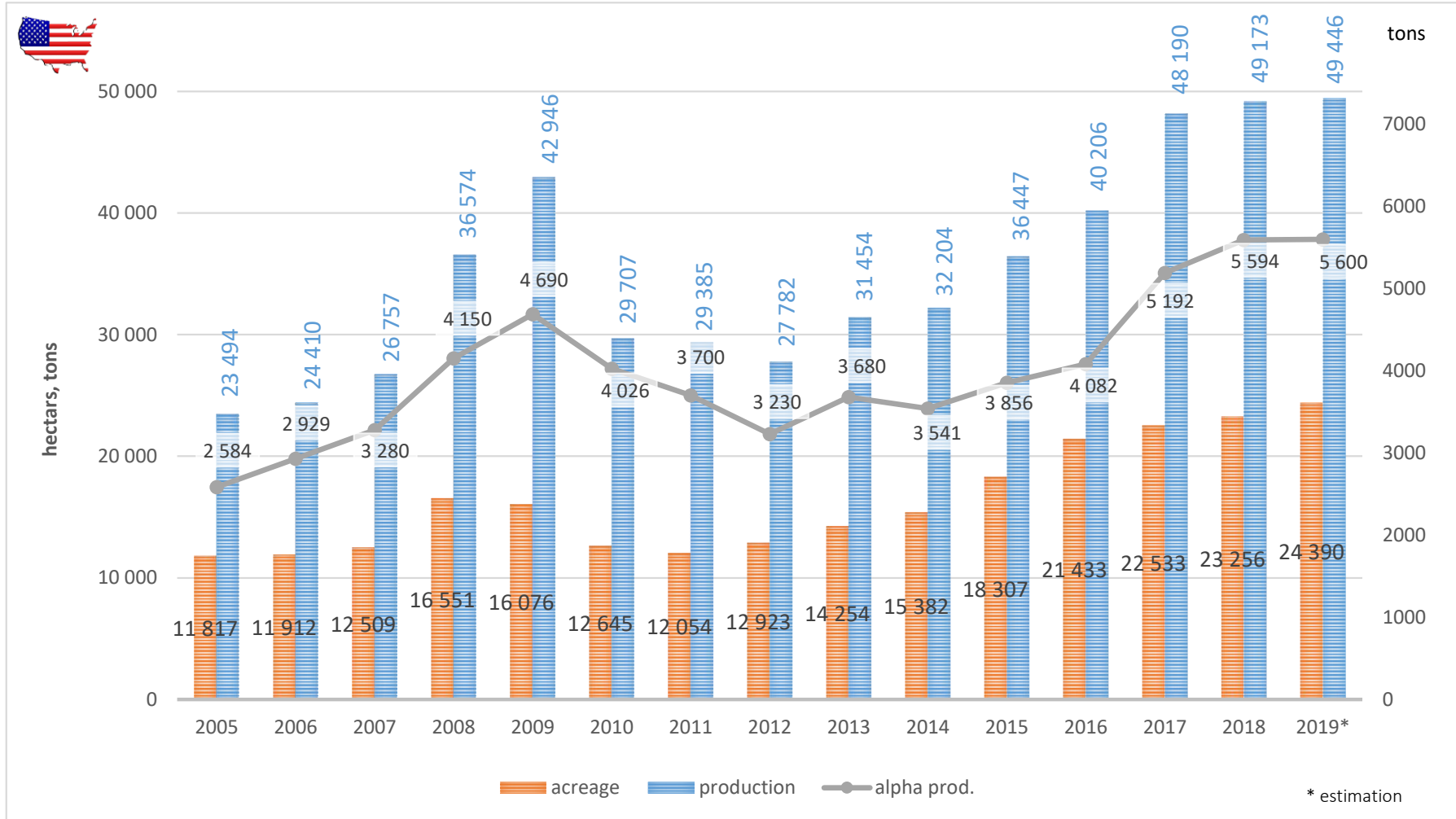


Figure 17: USA hop crops 2005 - 2019\*





# International Hop Growers' Convention

IHGC-Economic Committee: April 2019 - Freising, Germany

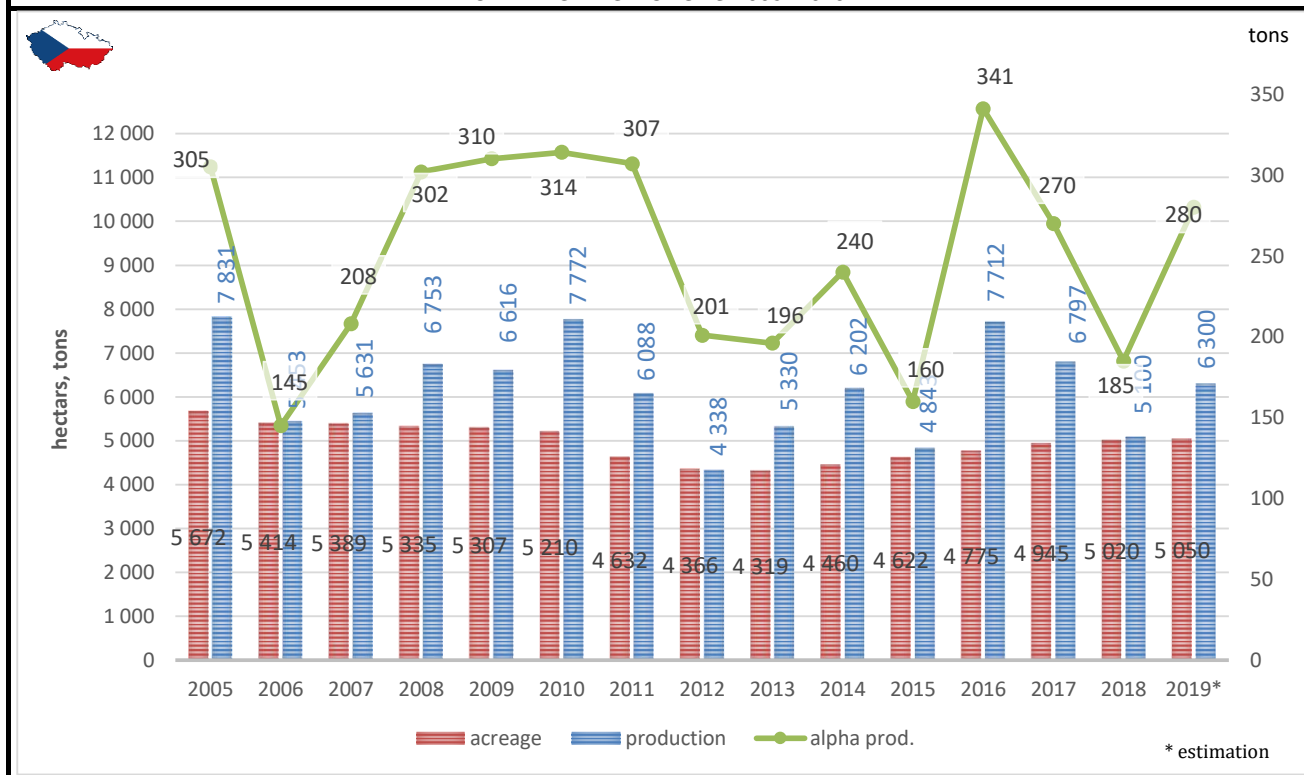
Country:  
**Czech Republic**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	100	100	97	80	75	60

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops	7,3	7,8			farmer price
Alpha Hops	5,0	5,2			farmer price
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019	
O-Hop Area (Ha)	10,55	10,55	Main O-varieties Saaz Premiant
O-Production (MT)	6,90	10,00	

Country, Date:

xx. xx. xxxx

Member Organization(s):

Hop Growers Union of the Czech Rep.